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TVB

A RESEARCH TREND REPORT

TRENDS
IN VCR USAGE

Prepared by the TVB Research Department

9/90

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VCR TRENDS
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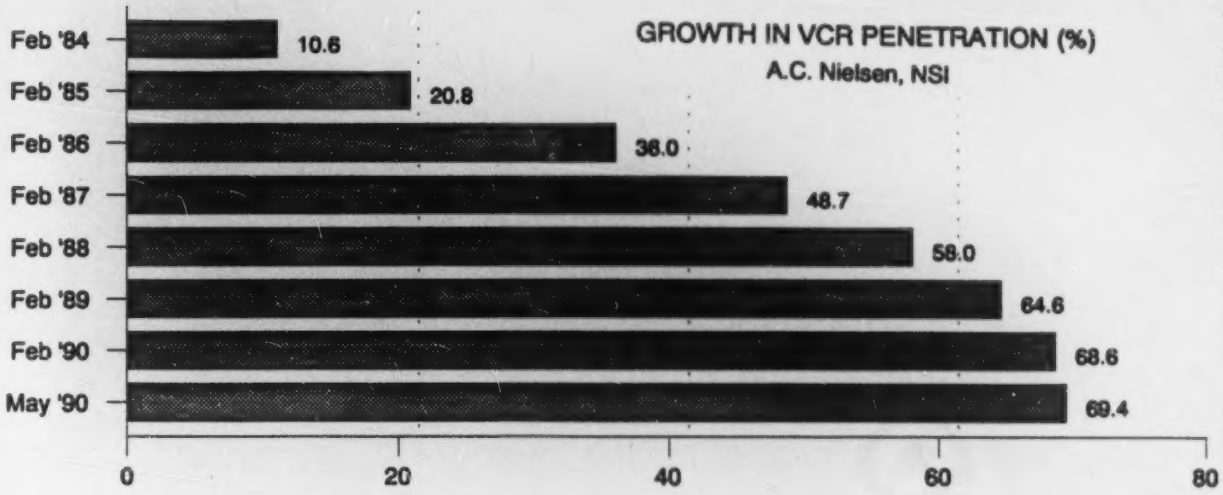
Highlights

* VCR growth has taken off in the last few years. Six years ago VCR penetration was just over 10 percent of TV households. Now current estimates put VCR penetration at 69.4%. (page 3)



* While penetration of VCR's has been highest in "A" counties, the east and west coasts and markets 1-10, all segments recorded gains during the past year. (page 4)

* The latest revised forecasts from Paul Kagan show that VCR penetration will top 90% by 1999. (page 5)

* VCR's were used an average of 123 minutes per week during the first half of 1990 to record, down from previous years. They were used for 230 minutes per week in play mode, also down from previous years. (page 7)

* Daytime (M-F) and prime time (M-S) are by far the most popular times to record with the VCR. The use of the play mode is distributed a little more evenly, with daytime, early fringe and prime time being the most popular dayparts. (page 8)

* In prime time, Sunday is by far the most popular record day while the play mode is used more evenly, with Saturday, Friday and Sunday the most popular, in that order. (page 9)

* VCR recording is done with the set off 52% of the time, with the set on while tuned to the same channel 30% of the time and while tuned to a different channel 18% of the time. 80% of the time over-the-air programs are being recorded. (page 10)

VCR HOUSEHOLDS & PERCENT PENETRATION

	TV Households (000)	VCR Households (000)	% of TV Households
1975	68,500	---	---
1976	69,600	---	---
1977	71,200	---	---
1978	72,900	200	0.3
1979	74,500	400	0.5
1980	76,300	840	1.1
1981	79,900	1,440	1.8
1982	81,500	2,530	3.1
1983	83,300	4,580	5.5
1984	83,800	8,880	10.6
1985	84,900	17,660	20.8
1986	85,900	30,920	36.0
1987	87,400	42,560	48.7
1988	88,600	51,390	58.0
1989	90,400	58,400	64.6
1990 Feb.	92,100	63,180	68.6
May	92,100	63,917	69.4

Source: VCR--A.C. Nielsen (NSI) Feb. each year TvB estimates prior to 1984

TV Households--A.C. Nielsen (NTI) Jan. each year

VCR PENETRATION BY DEMOGRAPHICS

		May '89	May '90
By County Size			
	A	69.9%	73.2%
	B	65.0	69.0
	C	62.5	66.8
	D	55.6	60.9
By Territory			
	Northeast	68.9%	73.1%
	East Central	63.3	67.4
	West Central	63.5	67.9
	South	61.8	65.2
	Pacific	70.9	74.8
By Market Size	1- 10	71.2%	74.4%
	11- 20	64.6	68.7
	21- 50	64.6	68.7
	51-100	61.6	66.6
	101	60.2	64.2

Source: A.C. Nielsen (NSI)

VCR HOUSEHOLD PROJECTIONS TO 1999

At Year End	TV Households (000)	VCR Households (000)	% of TV Households
1991	93,400	70,600	75.6
1992	94,400	74,000	78.4
1993	95,500	77,000	80.6
1994	96,500	79,600	82.5
1995	97,600	82,270	84.3
1996	98,700	85,020	86.1
1997	99,800	87,820	88.0
1998	100,900	90,650	89.8
1999	102,000	93,500	91.7

Source: Paul Kagan Assoc.

HOURS OF TV USAGE - VCR VS. NON VCR HOUSEHOLDS
Per TV Home Per Day

		Non-VCR Households	VCR Households*		
			Total	Reg. Usage	Rec./Set Off
1988	Jan	7:41	7:52	7:41	:11
	Feb	7:36	7:41	7:28	:13
	Mar	7:21	7:18	7:05	:13
	Apr	6:56	6:50	6:40	:10
	May	6:42	6:42	6:32	:10
	Jun	6:27	6:29	6:19	:10
	Jul	6:35	6:29	6:20	:09
	Aug	6:35	6:33	6:23	:10
	Sep	6:49	6:56	6:44	:12
	Oct	7:00	7:03	6:52	:11
	Nov	7:16	7:22	7:11	:11
	Dec	7:25	7:21	7:09	:12
	Average	7:02	7:03	6:52	:11
1989	Jan	7:39	7:42	7:32	:10
	Feb	7:36	7:31	7:21	:10
	Mar	7:29	7:22	7:10	:12
	Apr	7:03	7:02	6:52	:10
	May	6:40	6:43	6:33	:10
	Jun	6:29	6:32	6:23	:09
	Jul	6:14	6:33	6:24	:09
	Aug	6:22	6:40	6:31	:09
	Sept	6:35	6:55	6:45	:10
	Oct	6:48	7:06	6:56	:10
	Nov	7:13	7:22	7:12	:10
	Dec	7:22	7:26	7:17	:09
	Average	6:58	7:05	6:55	:10
1990	Jan	7:34	7:39	7:29	:10
	Feb	7:08	7:22	7:12	:10
	Mar	6:55	7:05	6:55	:10
	Apr	6:42	6:50	6:40	:10
	May	6:29	6:37	6:27	:10
	Jun	6:20	6:30	6:21	:09
	Average	6:52	7:01	6:51	:10

*Includes VCR recording with set off but does not include any playback activity

Source: Nielsen, NTI
VCR Status Report

Note: Data prior to Sept. 1987 based on NTI Audimeter Sample. From Sept. 1987 on, is based on NTI People Meter Sample

VCR RECORD & PLAY - TIME SPENT
Total Minutes-Average Week

	---- Record ----				---- Play ----			
	1987	1988	1989	1990	1987	1988	1989	1990
Jan	198	154	142	129	315	297	290	233
Feb	212	179	154	141	299	296	276	248
Mar	184	168	142	126	281	294	258	232
Apr	159	139	129	116	264	263	246	230
May	144	143	134	122	217	233	216	214
Jun	117	122	108	104	241	236	229	224
Jul	113	110	104		240	267	231	
Aug	109	119	98		245	268	228	
Sep	139	135	122		240	242	208	
Oct	151	139	119		240	228	205	
Nov	170	154	131		252	256	225	
Dec	156	146	122		254	255	213	
Avg. Full Year	154	142	125		257	261	235	
Year-to-Date	169	151	135	123	270	270	253	230

Source: Nielsen-NTI
VCR Tracking Report

Note: Data prior to Sept. 1987 based on NTI Audimeter Sample. From Sept. 1987 on, is based on NTI People Meter Sample

VCR RECORD AND PLAY - DISTRIBUTION BY DAYPARTS

Share By Dayparts
Average Week

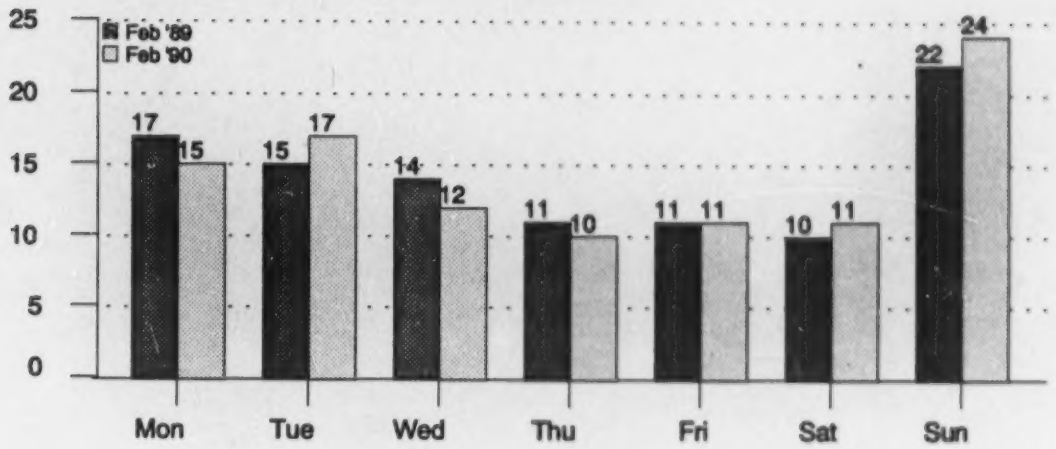
		Record		Play	
		Feb.'89	Feb.'90	Feb.'89	Feb.'90
MON-FRI	6-10am	2%	2%	5%	5%
	10am-4:30pm	27	26	16	16
	4:30 - 8pm	6	5	15	15
MON-SUN	8-11pm*	41	43	25	25
	11pm-1am	8	8	10	10
	1-6am	7	7	6	5
SAT/SUN	6am-1pm	3	3	8	9
SAT	1-8pm	3	3	8	8
SUN	1-7pm	3	3	7	7
Total		100%	100%	100%	100%
# minutes		(154)	(141)	(276)	(248)

*7-11pm on Sunday

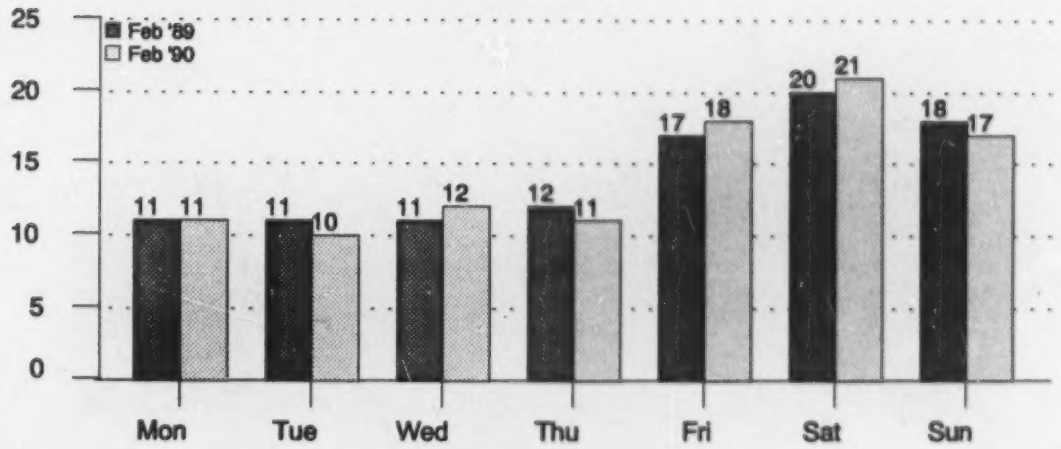
Source: Nielsen, NTI
VCR Tracking Report

PRIME TIME* VCR RECORD/PLAY ACTIVITY
BY NIGHT OF WEEK

VCR RECORD ACTIVITY (% of total week)



VCR PLAY ACTIVITY (% of total week)



MINUTES/WEEK

	Feb. '89	Feb. '90
Record	63	62
Play	68	61

*Mon-Sat. 8-11pm
Sun. 7-11 pm
Tracking Report

Source: Nielsen-NTI
VCR Tracking Report

VCR RECORDING BY SET STATUS AND SOURCE
Average Week

By Set Status

		Feb.'89	Feb.'90
Set Off		51%	52%
Set On:			
	Different Channel	18	18
	Same Channel	31	30
		100%	100%

By Source

	Feb.'89	Feb.'90
Network Affiliates	66%	64%
Independents	13	14
Public	4	4
Pay Service	10	10
Cable Origination	7	8
	100%	100%

Source: Nielsen-NTI
VCR Tracking Report

NSI May 1990 VCR Penetration

Market Name	%
ABILENE-SWEETWATER	62.0
ADA-ARDMORE	64.7
ALBANY, GA	58.4
ALBANY-SCHENECTADY-TROY	71.1
ALBUQUERQUE-SANTA FE	64.3
ALEXANDRIA, LA	59.8
ALPENA	64.7
AMARILLO	62.9
ANCHORAGE	82.4
ANNISTON	62.0
ATLANTA	72.8
AUGUSTA	59.9
AUSTIN	71.8
BAKERSFIELD	64.5
BALTIMORE	74.4
BANGOR	75.1
BATON ROUGE	65.3
BEAUMONT-PORT ARTHUR	64.5
BEND, OR	77.4
BILLINGS	66.7
BILOXI-GULFPORT	62.9
BINGHAMTON	66.0
BIRMINGHAM	60.7
BLUEFIELD-BECKLEY-OAK HILL	61.3
BOISE	66.9
BOSTON	76.3
BOWLING GREEN	63.9
BUFFALO	63.9
BURLINGTON-PLATTSBURGH	68.0
BUTTE	69.2
CASPER-RIVERTON	68.8
CEDAR RAPIDS-WATERLOO&DUBQ	66.5
CHAMPAIGN&SPRNGFLD-DECATUR	64.7
CHARLESTON, SC	67.9
CHARLESTON-HUNTINGTON	61.7
CHARLOTTE	64.0
CHARLOTTESVILLE	67.8
CHATTANOOGA	64.3
CHEYENNE-STERLING	67.0
CHICAGO	73.1
CHICO-REDDING	71.1
CINCINNATI	67.3
CLARKSBURG-WESTON	61.2
CLEVELAND	66.8
COLORADO SPRINGS-PUEBLO	72.4
COLUMBIA, SC	67.4
COLUMBIA-JEFFERSON CITY	65.4
COLUMBUS, GA	59.3
COLUMBUS, OH	70.4
COLUMBUS-TUPELO-WEST POINT	56.6
CORPUS CHRISTI	63.5
DALLAS-FT. WORTH	73.1
DAVENPORT-R.ISLAND-MOLINE	66.6
DAYTON	70.8
DENVER	70.4
DES MOINES-AMES	64.9
DETROIT	72.5
DOTHAN	62.9
DULUTH-SUPERIOR	59.9
EL PASO	68.3
ELMIRA	65.7
ERIE	61.7
EUGENE	74.0
EUREKA	71.1
EVANSVILLE	67.9
FAIRBANKS	85.0
FARGO-VALLEY CITY	61.3
FLINT-SAGINAW-BAY CITY	69.5
FLORENCE-MYRTLE BEACH	57.4
FRESNO-VISALIA	72.5
FT. MYERS-NAPLES	68.8
FT. SMITH	65.3
FT. WAYNE	65.4
GAINESVILLE	69.0
GLENDIVE	56.7
GRAND JUNCTION-MONTROSE	68.1
GRAND RAPIDS-KALMZOO-B.CRK	67.6
GREAT FALLS	65.4
GREEN BAY-APPLETON	64.7
GREENSBORO-H.POINT-W.SALEM	65.0
GREENVILLE-N.BERN-WASHNGTN	65.2
GREENVILLE-SPART-ASHEVILLE	64.6
GREENWOOD-GREENVILLE	43.0
HARLINGEN-WESLACO-BRNSVLLE	58.1
HARRISBURG-LNCSTR-LEB-YORK	65.6
HARRISONBURG	63.7
HARTFORD & NEW HAVEN	73.2
HATTIESBURG-LAUREL	63.0
HELENA	64.0
HONOLULU	74.4
HOUSTON	70.1
HUNTSVILLE-DECATUR, FLOR	63.8
IDAHO FALLS-POCATELLO	70.8
INDIANAPOLIS	71.6
JACKSON, MS	63.7
JACKSON, TN	56.4
JACKSONVILLE	60.8
JOHNSTOWN-ALTOONA	65.0
JONESBORO	57.8
JOPLIN-PITTSBURG	58.6
KANSAS CITY	69.0
KNOXVILLE	63.9
LA CROSSE-EAU CLAIRE	58.8
LAFAYETTE, IN	72.6
LAFAYETTE, LA	67.6
LAKE CHARLES	70.9
LANSING	73.3
LAREDO	44.9
LAS VEGAS	80.6
LEXINGTON	62.2
LIMA	63.2
LINCOLN & HSTNGS-KRNYPLUS	56.6
LITTLE ROCK-PINE BLUFF	65.7
LOS ANGELES	75.8
LOUISVILLE	67.2
LUBBOCK	69.9
MACON	62.7
MADISON	67.2
MANKATO	58.0
MARQUETTE	60.1
MEDFORD-KLAMATH FALLS	70.5
MEMPHIS	60.8
MERIDIAN	58.3
MIAMI-FT. LAUDERDALE	61.8
MILWAUKEE	73.8
MINNEAPOLIS-ST. PAUL	71.0
MINOT-BISMARCK-DICKINSON	57.8
MISSOULA	65.6
MOBILE-PENSACOLA	70.1
MONROE-EL DORADO	57.7
MONTEREY-SALINAS	73.2
MONTGOMERY	57.5
NASHVILLE	67.0
NEW ORLEANS	65.8
NEW YORK	75.8
NORFOLK-PORTSMTH-NEWPT NWS	69.8
NORTH PLATTE	63.8
ODESSA-MIDLAND	62.9
OKLAHOMA CITY	68.4
OMAHA	66.5
ORLANDO-DAYTONA BCH-MELBRN	67.3
OTTUMWA-KIRKSVILLE	58.8
PADUCAH-C.GIRARDEAU-HARRBG	62.3
PALM SPRINGS	71.4
PANAMA CITY	65.8
PARKERSBURG	63.8
PEORIA-BLOOMINGTON	64.0
PHILADELPHIA	72.1
PHOENIX	73.4
PITTSBURGH	63.4
PORTLAND, OR	72.6
PORTLAND-AUBURN	70.0
PRESQUE ISLE	73.4
PROVIDENCE-NEW BEDFORD	70.6
QUINCY-HANNIBAL-KEOKUK	56.1
RALEIGH-DURHAM	62.7
RAPID CITY	61.2
RENO	79.1
RICHMOND-PETERSBURG	65.5
ROANOKE-LYNCHBURG	62.5
ROCHESTER, NY	72.5
ROCHESTR-MASON CITY-AUSTIN	66.4
ROCKFORD	69.6
SACRAMNTO-STKTN-MODESTO	76.2
SALISBURY	67.4
SALT LAKE CITY	79.2
SAN ANGELO	68.8
SAN ANTONIO	63.0
SAN DIEGO	75.3
SAN FRANCISCO-OAK-SAN JOSE	76.7
SANTABARBRA-SANMAR-SANLUOB	72.3
SAVANNAH	62.2
SEATTLE-TACOMA	73.2
SHREVEPORT	60.3
SIOUX CITY	57.8
SIOUX FALLS(MITCHELL)	53.5
SOUTH BEND-ELKHART	69.3
SPOKANE	71.6
SPRINGFIELD, MO	61.4
SPRINGFIELD-HOLYOKE	66.5
ST. JOSEPH	62.1
ST. LOUIS	67.6
SYRACUSE	70.0
TALLAHASSEE-THOMASVILLE	64.1
TAMPA-ST. PETE, SARASOTA	63.7
TERRE HAUTE	57.6
TOLEDO	69.7
TOPEKA	63.0
TRAVERSE CITY-CADILLAC	64.5
TRI-CITIES, TN-VA	58.9
TUCSON(NOGALES)	72.2
TULSA	62.8
TUSCALOOSA	65.5
TWIN FALLS	60.6
TYLER	61.4
UTICA	67.0
VICTORIA	68.4
WACO-TEMPLE	63.0
WASHINGTON, DC	74.7
WATERTOWN	70.5
WAUSAU-RHINELANDER	66.5
WEST PALM BEACH-FT. PIERCE	64.5
WHEELING-STEUBENVILLE	61.2
WICHITA FALLS & LAWTON	62.6
WICHITA-HUTCHINSON PLUS	64.2
WILKES BARRE-SCRANTON	64.1
WILMINGTON	55.3
YAKIMA	67.8
YOUNGSTOWN	63.1
YUMA-EL CENTRO	62.7
ZANESVILLE	59.6

Arbitron May 1990 VCR Penetration Estimates

MARKET NAME	VCR PCT	VCR TVHH
Abilene-Sweetwater	71	81,800
Albany, GA	65	89,200
Albany-Schenectady-Troy	74	362,700
Albuquerque	75	375,700
Alexandria, LA	72	63,700
Alpena	74	11,400
Amarillo	70	129,500
Anniston	77	35,100
Ardmore-Ada	64	47,400
Atlanta	71	981,800
Augusta	69	143,500
Austin, TX	74	266,200
Bakersfield	76	116,100
Baltimore	79	735,900
Bangor	81	93,700
Baton Rouge	77	194,400
Beaumont-Port Arthur	69	114,100
Bend	87	23,000
Billings-Hardin	70	59,200
Biloxi-Gulfport-Pascagoula	77	51,100
Binghamton	73	115,000
Birmingham	60	314,800
Bluefield-Beckley-Oak Hill	64	96,200
Boise	69	107,800
Boston	75	1,576,600
Bowling Green	67	29,800
Bristol-Kingsport-Johnson City: Tri-Cities	64	181,500
Buffalo	66	405,500
Burlington-Plattsburgh	79	208,400
Butte	69	33,600
Casper-Riverton	73	30,700
Cedar Rapids-Waterloo-Dubuque	70	215,300
Charleston, SC	76	167,400
Charleston-Huntington	70	363,900
Charlotte	72	522,700
Charlottesville	74	30,300
Chattanooga	68	199,200
Cheyenne-Scottsbluff-Sterling	69	30,700
Chicago	76	2,368,000
Chico-Redding	75	114,700
Cincinnati	75	557,100
Clarksburg-Weston	62	69,200
Cleveland	70	1,002,800
Colorado Springs-Pueblo	68	161,600
Columbia, SC	71	213,600
Columbia-Jefferson City	61	81,100
Columbus, GA	66	122,100
Columbus, OH	72	490,200
Columbus-Tupelo	68	111,700
Corpus Christi	72	126,100
Dallas-Ft. Worth	76	1,306,200
Davenport-Rock Island-Moline: Quad City	72	228,600
Dayton	74	370,100
Denver	71	743,300
Des Moines	66	250,700
Detroit	74	1,270,000
Dothan	71	73,900
Duluth-Superior	67	114,400
El Centro-Yuma	71	46,300
El Paso	77	172,900
Elmira	73	61,500
Erie	68	105,100
Eugene	73	132,800
Eureka	74	38,800
Evansville	74	194,300
Fargo	61	133,700
Flagstaff	94	27,100
Flint-Saginaw-Bay City	68	308,800
Florence-Myrtle Beach	72	110,900
Ft. Myers-Naples	78	191,900
Ft. Smith	73	142,600
Ft. Wayne	76	175,400
Fresno-Visalia	73	312,900
Gainesville	73	64,300
Grand Junction-Durango	65	42,300
Grand Rapids-Kalamazoo-Battle Creek	70	434,200
Great Falls	72	46,700
Green Bay-Appleton	71	269,800
Greensboro-Winston Salem-High Point	67	342,900
Greenville-New Bern-Washington	71	158,100
Greenville-Spartanburg-Asheville	71	457,700
Greenwood-Greenville	60	49,500
Hagerstown	72	30,500
Harrisburg-York-Lancaster-Lebanon	71	390,300
Harrisonburg	66	23,700
Hartford-New Haven	78	700,500
Helena	75	14,600
Houston	72	1,040,800
Huntsville-Decatur-Florence	75	229,900
Idaho Falls-Pocatello	74	75,400
Indianapolis	75	640,700
Jackson, MS	62	181,100
Jackson, TN	72	42,200
Jacksonville	72	334,000
Johnstown-Altoona	62	173,800
Jonesboro	54	39,600
Joplin-Pittsburg	41	58,900
Kansas City	72	545,000
Knoxville	65	266,200
La Crosse-Eau Claire	64	106,400
Lafayette, IN	57	24,500
Lafayette, LA	72	140,400
Lake Charles	77	58,300
Lansing	68	152,000
Laredo	69	24,900
Las Vegas	80	216,400
Laurel-Hattiesburg	71	64,600
Lexington	67	245,000
Lima	71	29,300
Lincoln-Hastings-Kearney	63	160,300
Little Rock	63	289,500
Los Angeles	73	3,590,700
Louisville	65	352,700
Lubbock	71	97,600
Macon	70	122,100
Madison	71	195,400
Mankato	63	14,600
Marquette	62	34,500
McAllen-Brownsville: LRGV	74	147,200
Medford	75	99,900
Memphis	68	412,200
Meridian	60	40,700
Miami	62	801,400
Milwaukee	76	576,000
Minneapolis-St. Paul	73	978,700
Minot-Bismarck-Dickinson	66	94,900
Missoula	69	54,400
Mobile-Pensacola	65	303,400
Monroe-El Dorado	62	113,200
Montgomery-Selma	57	124,700
Nashville	72	522,000
New Orleans	72	461,100
New York	75	5,251,200
Norfolk-Portsmouth-Newport News-Hampton	74	424,100
North Platte	66	11,800
Odessa-Midland	72	102,900
Oklahoma City	62	375,100
Omaha	65	229,000
Orlando-Daytona Beach-Melbourne	74	642,200
Ottumwa-Kirksville	59	16,900
Paducah-Cape Girardeau-Harrisburg-Marion	58	189,000
Palm Springs	82	55,100
Panama City	79	64,400
Parkersburg	70	25,300
Peoria-Bloomington	69	143,700
Philadelphia	68	1,850,100
Phoenix	80	800,700
Pittsburgh	70	816,700
Portland, OR	72	580,500
Portland-Poland Spring	84	283,000
Presque Isle	78	22,800
Providence-New Bedford	73	606,500
Quincy-Hannibal	58	70,900
Raleigh-Durham	72	497,000
Rapid City	66	57,100
Reno	90	89,100
Richmond	69	303,700
Roanoke-Lynchburg	66	242,700
Rochester, NY	71	250,300
Rochester-Mason City-Austin	66	93,700
Rockford	76	118,300
Sacramento-Stockton	77	770,800
St. Joseph	62	29,600
St. Louis	73	818,500
Salinas-Monterey	81	169,800
Salisbury	90	84,100
Salt Lake City	79	473,900
San Angelo	71	34,100
San Antonio	71	407,900
San Diego	84	725,200
San Francisco-Oakland-San Jose	80	1,751,100
Santa Barbara-Santa Maria-San Luis Obispo	80	165,000
Savannah	64	146,200
Seattle-Tacoma	82	1,059,500
Shreveport-Texarkana	66	267,800
Sioux City	59	92,600
Sioux Falls-Mitchell	60	140,900
South Bend-Elkhart	76	223,100
Spokane	76	242,000
Springfield, MA	74	180,200
Springfield, MO	66	194,400
Springfield-Decatur-Champaign	69	232,400
Syracuse	73	270,600
Tallahassee-Thomasville	68	127,600
Tampa-St. Petersburg	73	966,700
Terre Haute	67	108,100
Toledo	67	274,900
Topeka	65	99,100
Traverse City-Cadillac	71	135,600
Tucson	78	239,600
Tulsa	68	313,500
Tuscaloosa	72	39,600
Twin Falls	67	20,200
Tyler-Longview-Jacksonville	71	121,800
Utica	72	74,800
Victoria	69	17,900
Waco-Temple-Bryan	69	170,100
Washington, DC	75	1,270,800
Watertown-Carthage	69	56,500
Wausau-Rhinelander	71	135,500
West Palm Beach-Ft. Pierce-Vero Beach	78	388,200
Wheeling-Steubenville	66	103,600
Wichita-Hutchinson	62	269,700
Wichita Falls-Lawton	72	116,800
Wilkes Barre-Scranton	72	349,800
Wilmington	69	98,900
Yakima	74	124,600
Youngstown	66	382,300
Zanesville	71	22,500
Total VCR Households		66,197,600